

August 13, 1998

MEMO

To: CAO Board of Directors

From: Jerralynn Ness, Executive Director

Subject: 1998-99 Annual Work Plan

The attached work plan includes strategies for the second year of our five year strategic plan. The strategic goals and objectives remain the same with the exception of Objectives A and C under Goal VII: CAO is financially viable. In Objective A, the five year fundraising goal has been adjusted down from \$2 million to \$1.3 million, which is more realistic. In Objective C, the five year goal for building a "\$125,000 reserve" has been increased and restated to "Build \$300,000 in accessible, unrestricted funds", which we believe is feasible if the strategy includes obtaining a \$150,000 line of credit. We are projecting a \$40,000 surplus for fiscal year 97-98. If we can maintain this as an average, we can reach \$200,000 in unrestricted funds in five years.

The 1998-99 annual plan will be discussed at the August Board meeting and action requested to approve it. Please give me a call if you have any questions.

Community Action Organization 1998-99 Work Plan

Overall Strategic Goal: CAO provides high quality services and, with active involvement from the community, addresses issues of poverty.

Strategic Goal I: Early childhood development services are responsive to the needs of the community.

Strategic Objective A: Increase enrollment of low-income children in CAO pre-school programs by 50%.

1998-99 Strategies

- 1. Implement partnership with Beaverton Schools to serve an additional 20 children with Title I or other District resources.*
- 2. Develop partnerships with Tigard and Hillsboro schools to prepare at least 2 additional pre-kindergarten sites that will be housed in schools and will provide additional enrollment opportunities from other funding sources.*
- 3. Implement services for 120 additional children through Oregon Department of Education expansion funds.*

Strategic Objective B: Increase the quality of Head Start Services to ensure that children are academically and socially ready for school and that schools are prepared for the needs and interests of the children.

1998-99 Strategies

- 1. Maintain at least 85% overall average attendance; perform analysis when average attendance falls below 85%.*
- 2. Promote staff competence by providing on-site consultation and mentoring to classrooms monthly in the areas of social services, education, health, mental health and disabilities services.*
- 3. Provide 40 hours of inservice training to teachers, family advocates, and coordinators in the areas of teamwork and pursuing excellence.*
- 4. Assure that 95% of enrolled 4 year olds who will go to kindergarten in the fall will have literacy skills to identify their own printed name and will have achieved at least two individual learning objectives.*
- 5. Provide training for teachers so they are better prepared to assist children in acquiring computer skills; provide an upgraded 486 computer with children's games for every classroom.*

Strategic Objective C: Increase parent involvement in their children's education and understanding of their children's development.

1998-99 Strategies

- 1. Parent participation in the education program through volunteer work in classrooms or attendance at family events will exceed an average of 16 hours per family.*
- 2. 200 parent-led activities will be conducted in Head Start classrooms.*

3. *760 parent-teacher conferences will be conducted to establish goals and review child progress.*
4. *In the center-based model provide 1080 home visits with education content for parents and children.*
5. *In the home-based model provide 530 home visits with content from all components for parents and children.*
6. *In the expansion model, provide 755 home visits with content from all components for parents and children.*
7. *Provide 20 group meetings focused on parenting, child development, or family literacy involving at least 120 parent families.*

Strategic Objective D: Ensure that children's health, nutrition, and developmental needs are identified and addressed.

1998-99 Strategies

1. *All children enrolled in Head Start will be fully immunized.*
2. *All enrolled children will have comprehensive screenings within 45 days of first attendance.*
3. *All health and developmental concerns identified by screenings will be evaluated and followed up to ensure resolution.*
4. *Cooperation among health care providers, parents, and other human service providers will be promoted through 5 Health Advisory committee luncheons.*

Strategic Objective E: Support the development of families with children.

1998-99 Strategies

1. *80% of families will achieve at least two objectives on their family development plan.*
2. *20 parents will be involved as leaders or advocates by attending state or regional Head Start meetings, serving on the Head Start Policy Council or its committees, serving on the Community Action Board or committees, or participating in other community groups.*
3. *20 parents will receive Parent Training Funds to help with the cost of education or training.*
4. *All Head Start parents will be provided with an up-to-date community resource list.*
5. *All families will receive one on one assistance from teachers or Family Advocates to help them achieve goals and access community resources.*
6. *30 parents will receive one on one assistance from the Mental Health consultant.*

Objective F: Expand services to children and families through providing access to child care, support and training to child care providers and by providing prenatal care and support services to pregnant low income women.

1998-99 Strategies

1. *Assist 1,600 households with child care referrals through the Metro Childcare Resource Referral service.*
2. *Maintain at least 600 child care providers on the Metro Childcare Resource and Referral database.*
3. *Assist 1200 low income families on the Adult and Family Services caseload to obtain child care referrals and information in order that parents can participate in employment activities.*
4. *Provide on site literacy based trainings to 40 home or center based child care providers.*

5. *Provide 400 family child care providers monthly reimbursements for food and snacks in order to increase the nutritional well-being of children in child care settings.*
6. *Provide before and after school child care for 80 school age children in the Forest Grove and Banks School Districts.*
7. *Link 370 pregnant low income women with prenatal care and social services in order that their babies are born healthy with normal birth weights and are provided with ongoing medical services.*

Strategic Goal II: The community and CAO have adequate capacity to prevent homelessness, provide shelter and affordable housing.

Strategic Objective A: Stabilize 2,142 homeless families through the provision of shelter, transitional housing and support services.

1998-99 Strategies

1. *Provide 5,500 bednights of shelter at the CAO Family Shelter to 70 homeless families (250 individuals). Of these households, 75% will complete courses to obtain a Tenant Education Certificate and 50% will obtain stable housing after their shelter stay.*
2. *Provide financial support to Domestic Violence Resource Center and Interfaith Outreach Services to shelter 200 homeless families (400 individuals), 50% of whom will obtain stable housing after their shelter stays.*
3. *Provide financial support to Housing Services of Oregon to provide day shelter for 300 homeless individuals.*
4. *Provide Homeless Education Liaison services to 60 homeless children at the CAO Shelter and the DVRC Shelter in conjunction with the Hillsboro School District and advocate to ensure that all homeless children are provided with services that are comparable to the services offered to other students in the school.*
5. *Through a contract with the Domestic Violence Resource Center provide outreach, housing stabilization, and shelter services to 84 farmworkers involved in domestic violence situations.*

Strategic Objective B: Increase the number of emergency shelter beds from 54 to 104.

1998-99 Strategies

1. *Provide assistance to Interfaith Outreach Services to fund operations of their new shelter which will increase their sheltering capacity from 14 beds to 34 beds, and convert their operations from part year to full year.*
2. *Assist the local faith based community in their efforts to utilize local churches as shelters and their congregations as shelter operators.*
3. *Work with Washington County to investigate options for a new CAO Family Shelter.*

Strategic Objective C: Double the number of transitional housing units and support services to homeless households, from 15 units to 30 units, assisting 27 additional homeless families annually.

1998-99 Strategies

- 1. In partnership with Washington County and other service providers develop a proposal for HUD McKinney funds to increase the number of transitional housing units by 50%.*
- 2. Coordinate local efforts to select and place families in transitional housing.*
- 3. Provide long term case management to 90 formerly homeless families, 85% of whom will maintain stable housing and 60% of whom will obtain or maintain employment.*

Strategic Objective D: Increase the availability of permanent affordable housing through advocacy, education and community organizing.

1998-99 Strategies

- 1. Participate in advocacy efforts sponsored by the Coalition for a Livable Future to promote affordable housing in regional and local land use plans and regulations.*
- 2. Participate with other community based organizations in efforts to educate Washington County elected officials and residents about the need for affordable housing.*
- 3. Provide technical assistance to community based organizations to support their efforts to develop affordable housing.*

Strategic Objective E: Prevent 950 households from becoming homeless through the provision of rent and mortgage assistance.

1998-99 Strategies

- 1. Provide financial assistance to prevent eviction and potential homelessness for 143 households, assist 71 households with one time move in costs, and assist 24 households move to more affordable housing. Of these households, 75% will maintain stable housing over a three month period and at least 50% will maintain stable housing over a six month period.*
- 2. Leverage \$12,000 from community groups for rent assistance.*

Strategic Objective F: Increase the comfort and affordability of housing by providing energy conservation services to 450 households.

1998-99 Strategies

- 1. Provide comprehensive weatherization and energy conservation education for 120 units occupied by low income residents, lowering energy usage by an average of 10%.*
- 2. Develop partnerships with non-profit housing developers to provide conservation measures for 42 units of new housing.*
- 3. Work in partnership with local energy providers to ensure the continuation of low income conservation programs during and after the energy deregulation process.*
- 4. Provide technical support, staff training, and low cost weatherization materials for the energy education component of the LIEAP program in order to provide energy conservation information to 1500 households.*

Strategic Objective G: Prevent housing discrimination through education and advocacy.

1998-99 Strategies

1. *Provide information on Fair Housing rights to low-income tenants and advocates by:*
 - *Disseminating written information to 1500 CAO clients;*
 - *Conducting 20 workshops/presentations to CAO tenant education classes, other tenant groups, and social service agency staffs;*
 - *Providing legal information and assistance to 2500 tenants to redress housing discrimination and assist with landlord-tenant disputes through contracts with Oregon Legal Services.*
2. *Provide information on Fair Housing responsibilities to members of the housing industry to prevent illegal discrimination by:*
 - *Conducting 4 workshops for landlords unaffiliated with property management companies;*
 - *Participating in planning the Oregon Fair Housing conference and participating in the Fair Housing Networking Group and Board of Realtors Equal Opportunity Committee.*
3. *Provide information on Fair Housing rights and responsibilities to the general public to raise awareness of housing discrimination and prevent future discrimination by conducting 4 presentations to high school students and/or community groups.*

Strategic Goal III: Community has access to comprehensive information & referral services.

Strategic Objective A: Increase community access to available and appropriate human services.

1998-99 Strategies

1. *Provide a bilingual information and referral service that responds to 13,000 inquiries, representing 21,000 requests for information, annually; 60% of these referrals will successfully link people with needed services.*
2. *Produce accurate printed I&R materials, including an annual resource guide with quarterly updates.*
3. *Review and revise phone directory listings, including the U.S. West Community Blue Pages.*
4. *Work with the Healthy Communities I & R Task Force to develop a comprehensive county wide information and referral network which provides multiple methods of access for those seeking community resource information.*

Strategic Objective B: Improve quality of information and referral service in terms of effectiveness, comprehensiveness and ease of use.

1998-99 Strategies:

1. *Develop and maintain an accurate information and referral database.*
2. *Update the information and referral data base semi-annually and distribute updates to county I & R providers.*
3. *Add at least 20 county resources to the I & R data base.*

Strategic Objective C: Increase communication and coordination among I & R service providers.

1998-99 Strategy: *Create a network of Washington County I&R providers and organize quarterly meetings of the group .*

Strategic Objective D: Identify gaps in services to support community planning needs.

1998-99 Strategy: *Use I&R system to document inquiries for which there are no viable referrals and compare the number of referrals to the number of services provided, in order to identify the need for additional community services.*

Strategic Goal IV: Low-income people in crisis obtain services they require.

Strategic Objective A: Prevent utility shut offs and utility arrearages for 7,500 households.

1998-99 Strategies

- 1. Provide financial assistance and energy conservation education to prevent utility shut offs for 375 low income households.*
- 2. Provide financial assistance and energy conservation education to decrease utility arrearages for 1125 low income households.*
- 3. Provide budget counseling and negotiations with utilities to enable 450 low income households to participate in utility payment plans.*

Strategic Objective B: Provide access to emergency assistance for 7578 households.

1998-99 Strategies

- 1. Temporarily relieve hunger for 1517 households by linking them to appropriate food box resource.*
- 2. Stabilize 104 households by providing basic needs assistance such as medications and transportation vouchers.*

Strategic Objective C: Increase communication, coordination and collaboration among emergency services providers.

1998-99 Strategies

- 1. Develop a network of county emergency service providers who will meet at least twice.*
- 2. Maintain a collaborative effort to operate Play It Again.*

Strategic Goal V: The community is supportive and actively involved in achieving CAO's mission.

Strategic Objective A: Increase volunteer involvement by 30% from 635 volunteers giving 7,000 hours to 825 volunteers giving 9,000 hours.

1998-99 Strategies

- 1. Increase outreach efforts to inform community of volunteer opportunities and better target recruitment.*
- 2. Identify potential group service projects within the agency to target recruitment of volunteers.*
- 3. Implement a formal volunteer recognition plan.*
- 4. Increase volunteer effectiveness by educating staff in volunteer management.*

Strategic Objective B: Increase countywide agency visibility through events, public relations and communications efforts which inform and educate the public.

1998-99 Strategies

- 1. Produce 3 newsletters, an agency brochure, English/Spanish program brochure, specific brochures for programs as needed, 1997-98 annual report and update display board.*
- 2. Obtain 4 comprehensive news stories on CAO and poverty concerns in Washington County; appear in all local newspapers at least 24 times and identify other media opportunities.*
- 3. Recruit and train 6 speakers who will make 45 presentations about Community Action and poverty in Washington County.*

Strategic Objective C: Support the involvement of low-income people in issues that impact them.

1998-99 Strategies

- 1. Recruit participation of CAO clients in advocacy efforts and public presentations on affordable housing, energy deregulation, and child care.*
- 2. Provide 3 trainings in leadership and advocacy for Head Start Policy Council members and Head Start parents; disseminate advocacy information to Policy Council and other interested individuals on a regular basis.*

Strategic Objective D: Increase private sector partnerships, to expand capacity and leverage additional resources.

1998-99 Strategies

- 1. Identify resources needed and potential private sector partners to incorporate into agency capacity building plan.*
- 2. Strengthen partnerships with Intel, Tuality Healthcare, Opening Doors partners, GTE and PGE; seek their assistance in expanding partnerships and addressing capacity needs.*

Strategic Objective E: Assure adequate services in the south/southeast area of the county.

1998-99 Strategies

1. *Establish a basic level of service and visibility in the Tigard area.*
2. *Implement a community planning process to develop a collaborative service delivery system that increases resources and service levels.*

Strategic Goal VI: CAO Board is actively and effectively involved.

Strategic Objective A: Achieve 80% attendance at all Board related meetings and activities.

1997-98 Strategies

1. *Clarify attendance expectations at recruitment.*
2. *Regularly encourage strong participation.*

Strategic Objective B: Achieve 100% Board involvement in fundraising and in annual contributions; raise \$500,000 through major gifts.

1998-99 Strategies

1. *Establish expectation and implement plan to obtain for annual gift from Board members.*
2. *Identify a role appropriate for each Board member's interests.*
3. *Provide training and support to facilitate Board involvement.*

Strategic Objective C: Increase Board visibility and ambassador role.

1997-98 Strategies

1. *Participate in speaking engagements, public events and press conferences.*
2. *Feature Board members prominently in news releases and annual report.*

Strategic Objective D: Increase member's knowledge of Board roles and responsibilities.

1997-98 Strategies

1. *Participate in an annual planning retreat.*
2. *Participate in at least one Board training annually.*
3. *Follow up on Board self-evaluation and implement suggestions to increase effectiveness.*
4. *Engage in on-going recruitment and cultivation of new Board and committee members.*

Strategic Objective E: Increase Board understanding of agency programs, needs of low income people and issues of poverty.

1997-98 Strategies

1. *Participate in a client related activity and/or volunteer in a program.*
2. *Tour CAO programs and sites.*
3. *Evaluate program effectiveness and celebrate successes.*

Strategic Objective F: Increase advocacy role of Board to achieve agency mission.

1997-98 Strategies

1. *Testify or present on behalf of the agency at public policy forums.*
2. *Generate advocacy letters needed to inform decision makers about the effects of policies on low income people.*
3. *Submit at least one "In My Opinion" article to the newspaper.*

Strategic Goal VII: CAO is financially viable.

Strategic Objective A: Raise \$1.3 million from private sources.

1998-99 Strategies

1. *Develop an agency capacity building plan which identifies needs and budget requirements.*
2. *Raise \$90,000 from private grants; \$50,000 to support capacity building plan and \$40,000 to support the shelter home.*
3. *Raise \$54,000 from the following events:*
 - \$12,000 from In-Home Coffees*
 - \$ 1,000 from Wine Raffle (one month of sales)*
 - \$ 5,000 from the Rotary Golf Tournament*
 - \$ 3,000 from the 1500 Club activities*
 - \$25,000 from Corporate event*
 - \$ 3,000 from Air Show*
 - \$ 5,000 from small events*
4. *Raise \$41,000 from the following appeals and presentations:*
 - \$ 7,000 from our annual appeal*
 - \$ 4,000 from targeted program appeals*
 - \$ 5,000 from four newsletters during the year*
 - \$ 1,000 from brick sales*
 - \$12,000 from United Way donor choice*
 - \$12,000 from general contributions*
5. *Raise \$45,000 from major gifts; \$30,000 from individuals and \$15,000 from corporations.*
6. *Raise \$25,200 for Emergency Funds*
 - \$12,000 from Westco for Hillsboro fund*
 - \$13,200 from Tigard area community for Neighborshare fund*

Strategic Objective B: Increase liquidity and solvency.

1998-99 Strategies

1. *Obtain additional \$200,000 in CDBG funds.*
2. *Restructure loans to reduce debt burden.*
3. *Pay off at least \$175,000 in debt, for a total debt payoff of \$325,000..*

Strategic Objective C: Build \$300,000 in accessible, unrestricted funds.

1998-99 Strategies

1. *Increase unrestricted funds by \$50,000 for a total of \$90,000.*
2. *Secure \$150,000 line of credit that is readily accessible, not to exceed 30 day intervals.*

Strategic Objective D: Improve financial management systems and technical skills.

1998-99 Strategies

1. *Link payroll system to financial system.*
2. *Provide needed training.*

Strategic Objective E: Exceed minimum standards of compliance by strengthening grant/contract management and written policies.

1998-99 Strategies

1. *Implement a centralized system for overseeing grants and contracts, that links program and fiscal.*
2. *Identify policies that need to be written or revised; establish a plan to complete them.*
3. *Obtain professional evaluation and recommendation for program databases that can be coordinated with the State's OMNITRACK program; explore pre-packaged client tracking programs.*

Strategic Goal VIII: Programs receive effective and efficient administrative and central support services.

Strategic Objective A: Automate and coordinate fiscal, budget and donor management information systems.

1998-99 Strategies

1. *Continue to strengthen linkage between finance and resource development in the tracking of donations.*
2. *Automate billing process.*
3. *Automate audit process.*

Strategic Objective B: Increase centralized personnel support services.

1998-99 Strategies

1. *Implement an employee data base and tracking system to improve management of salaries and benefits.*
2. *Complete the revision of agency personnel procedures*
3. *Provide regular trainings and orientations on personnel policies and procedures.*
4. *Identify staff development needs and coordinate a plan for addressing them.*
5. *Complete wage comparability study and establish plan to implement recommended changes.*

Strategic Objective C: Increase centralized management of facilities and equipment.

1998-99 Strategies

1. *Establish a communications system to identify facility and equipment support needs and to assist in prioritization.*
2. *Develop an inventory tracking system that facilitates the effective utilization and disposal of equipment.*
3. *Formalize and implement a comprehensive facilities maintenance plan.*
4. *Establish remote access to the network in Hillsboro office.*
5. *Set up e-mail and ability to fax directly from computer for all employees.*

Strategic Objective D: Implement a capacity building plan to increase support in the areas of fundraising, information management, staff development and organizational planning and responsiveness.

1998-99 Strategies

- 1. Develop and coordinate a computer orientation and training plan to support employees training needs.*
- 2. Develop a capacity building fund development plan to support the agencies needs in the areas of fundraising, public relations, technology and information systems.*
- 3. Develop in-house capacity to produce effective communication tools and visual expressions of CAO.*